



Company Pension to PRSA Transfer

Additional Information from Transferring Life Office / Trustees

Return To:

Pensions New Business
Irish Life Assurance plc
Lower Abbey Street
Dublin 1

Member Name

Member Date of Birth

/

/

Irish Life Reference Number

Name of transferring pension scheme:

Is this scheme defined contribution or defined benefit?

How long has the individual been a member of this scheme, including years as a member of any other scheme related to this employer or any person connected with this employer?

Have any benefits been paid to the member from this scheme?

Yes ☐ No ☐

Are all the members benefits being transferred, or is the transfer solely made up of AVCs paid by the member?

Yes ☐ AVCs Only ☐

If solely AVCs then please contact us as additional information is needed

Has a Pension Adjustment Order (PAO) granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement, or on any pension arrangement from which the transferring arrangement received a transfer? or

Yes ☐ No ☐

Does this transfer represent a non-member spouse's designated benefit granted under a PAO?

Yes ☐ No ☐

If yes to either question a court certified copy of the PAO is needed and we require the additional information below.

Pension Adjustment Order Questions

A court certified copy of the Pension Adjustment Order is needed in all cases

Where transfer contains member spouse's benefit only

Non-member spouse's details

- Name: _____
- Address: _____

- PPSN (if known): _____

Where was non-member spouse's benefit transferred to?

- Type of arrangement: _____
- Name and address of provider _____

- Trustee / employer (if applicable): _____
- Policy number: _____
- Amount transferred: € _____ Date transferred: ____ / ____ / ____

If you never held the non-member spouse's benefit and cannot answer the questions above then we'll need the following details about the office that originally held the benefits

- Type of arrangement: _____
- Name and address of provider _____

- Trustee / employer (if applicable): _____
- Policy number (if known): _____

Where transfer contains the non-member spouse's benefit only

Member spouse's date of birth	/ /
Does the transfer contain pension funds which do not form part of the amount granted under the PAO?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes: How much of the transfer represents the amount granted under the PAO?	€

Where the transfer contains both the member's and non-member spouse's benefit, Irish Life will require these be split as part of any transfer being accepted.

The member named on this application form wishes to transfer funds held under an approved occupational pension scheme into this PRSA. I confirm that the occupational pension scheme from which the assets are being transferred is an approved scheme under Finance Act 1972 or Chapter 1, Part 30 of the Taxes Consolidation Act 1997.

I confirm the answers to all questions in this form are complete and correct.

Name

Signature

Position

Company

Date

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Irish Life